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Spain

Citrus

Annual

2005

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Report Highlights:

Spanish citrus exports during Marketing Year (MY) 2005/06 will likely be at record-low levels, while imports reach record-high levels, as a result of the worst Iberian Peninsula drought in the last 60 years. (LR36SH4).

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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Madrid [SP1]
[SP]

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Executive Summary

- Spanish Marketing Year (MY) December/November 2005/06 fresh orange, orange juice, tangerine and lemon exports will likely be reduced somewhat from MY 2004/05 levels, because of a drought reduced exportable surplus.
 - o MY 2005/06 fresh orange exports at 1.0 Million Metric Tons (MMT) (1.2 MMT in MY 2004/05).
 - o MY 2005/06 orange juice exports at 102,000 Metric Tons (MT) (110,000 MT in 2004/05).
 - o MY 2005/06 tangerine exports at 1.4 Million Mt, (1.8 Million Mt in 2004/05), of which 50,000 MT will likely be shipped to the United States (60,000 M in 2004/05).
- During the second half of CY-2006, the European Commission (EC) has said it will begin to reform its Fruit and Vegetables Common Policy. Any new EC policy will likely incorporate some degree of subsidy decoupling for fruit-processing subsidies. Decoupling will certainly force some degree of rationalization within the industry. However, when the results of the fruit and vegetable policy reform are combined with reform of the cotton sector, which may free up land suitable for citrus production, there is at least the possibility of citrus-sector expansion.
- The Spanish citrus industry promotional activities are co-financed by the EC, the national government and the autonomous regional governments. During MY 2004/05, the Spanish citrus industry budgeted € 8 Million for promotions including to enhance Spanish citrus consumption in the United States.
- To improve the quality of Valencia citrus production, the Valencia autonomous region is implementing in Crop Year 2006 a new pest control program to reduce Mediterranean fruit-fly incidence.
- For more details on the Spanish citrus sector, please contact the following:

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Commodity Name: Oranges, Fresh

Production, Supply & Distribution Table

PSD Table

Country

Spain

Commodity

Oranges, Fresh

(HECTARES)(1000
TREES)(1000 MT)

	2003	Revised	2004	Estimate	2005	Forecast
	USDA	Post	USDA	Post	USDA	Post
	Official	Estimate	Official	Estimate	Official	Estimate
	[Old]	[New]	[Old]	[New]	[Old]	[New]
Market Year Begin		11/2003		11/2004		11/2005
Area Planted	136,757	136,757	148,000	150,094	0	151,000
Area Harvested	130,000	123,704	131,000	135,000	0	136,000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	3,052	3,052	2,700	2,691	0	2,150
Imports	150	162	170	300	0	400
TOTAL SUPPLY	3,202	3,214	2,870	2,991	0	2,550
Exports	1,720	1,597	1,300	1,200	0	1,000
Fresh Dom. Consumption	986	1,126	1,000	1,221	0	1,100
Processing	496	491	570	570	0	450
TOTAL DISTRIBUTION	3,202	3,214	2,870	2,991	0	2,550

Production

- Spanish 2005/06 fresh orange production will be down significantly from 2004/05 levels, affected by drought conditions during CY-2005;
- Spanish producers continue to expand orchards. Most of the new orchards are located in the *Andalucia* region, where the industry has recently carried out new investments in juice processing capacity.
- The CAP reform will also contribute to a potential increase in citrus acreage at the expense of cotton production. There are some 92,000 ha of cotton under irrigation, which are suitable for citrus production. Most popular varieties in new areas will tend to be Lanelate and Navelate.
- In the PSD Table above, fresh orange production data is from the Spanish Ministry of Agriculture (MAPYA).
- For fresh orange production data series from 1999/00 to 2005/06, and for key variety areas in total in CY-2003 (latest available MAPYA data) please check tables below.

Spain: Fresh Orange Areas and Outputs series

Year:	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
	Units: hectares						
Total Area	135,223	134,533	138,092	135,379	136,757	150,094	151,000
Total in Prod	125,865	120,870	125,089	121,445	123,704	135,000	136,000
	Units: 1,000 Metric Tons						
Production	2,691	2,616	2,898	2,963	3,052	2,691	2,150

Source: MAPYA. Data under 2004/05 and 2005/06 columns are preliminary. We have estimated 2004/05 and 2005/06 areas in production.

Spain: Orange Orchard Areas by Species In CY-2003

Varieties	Areas in Regular Plantation (hectares)		Scattered trees (Number)	Orchards uprooted in 2003 (hectares)	New Plantations In 2003 (hectares)
	Total	In Production			
NAVEL GROUP					
Navelina	53,125	49,467	43,178	10	537
Navel	17,140	16,083	85,642	318	243
Navelate	27,508	21,219	19,948	110	1,034
"BLANCAS SELECTAS"					
Salustiana	10,256	9,324	9,720	72	441
Otras blancas selectas	1,633	1,435	9,015	32	32
"BLANCAS COMUNES"	2,160	2,112	60,829	16	59
"SANGUINAS"	293	256	574	47	—
"TARDÍAS"					
Verna	1,134	1,117	1,340	100	5
Valencia late	23,508	22,691	44,506	10	447
TOTAL ORANGE	136,757	123,704	274,752	715	2,798

Consumption

- In the PSD Table, the numbers for fresh consumption are residual, and include weight losses during shipment, other losses and non-harvested citrus.
- We obtained the level of 2003/04 orange processing from MAPYA. We have estimated the 2004/05 and 2005/06 processing consumption data, based on preliminary and historical information.
- For per capita consumption levels, please check table below.

SPAIN: FRESH ORANGE PER CAPITA CONSUMPTION (KG/HAB/YEAR)

CY:	1999	2000	2001	2002	2003	2004	2005
Per Capita Consumption	20.9	23.1	22.3	23.8	24.0	25.9	23.5
Of which,							
. At Home (%)	84.9	85.1	83.5	84.2	83.5	83.5	83.5
. Hotels (%)	12.4	12.1	13.1	12.9	13.9	14.0	14.1
. Institutions (%)	2.8	2.8	3.4	2.9	2.6	2.5	2.4

Source: MAPYA (Consumer Panel) up till CY-2003. FAS Office estimate for CY 2004 and 2005.

Trade**Spain: Orange Imports (Metric Tons)**

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	77,442	183,771	101,747	153,789	162,185	300,000	400,000
EU-25	13,541	30,183	17,189	25,039	39,210	90,000	120,000
Non-EU	63,901	153,588	84,558	128,750	122,975	210,000	280,000

Source: Global Trade Atlas (GTIA) up till 2003/04. FAS Office estimate for 2004/05 and 2005/06, based on preliminary trade and output data.

Spain: Orange Exports (Metric Tons)

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	1,465,825	1,246,389	1,569,831	1,504,910	1,596,855	1,200,000	1,000,000
To U.S.	103	101	15	20	0	10	0
EU-25	1,387,313	1,173,287	1,478,257	1,425,972	1,515,915	1,100,000	950,000
Other	78,409	73,001	91,559	78,918	80,940	100,000	50,000

Source: Global Trade Atlas (GTIA) up till 2003/04. FAS Office estimate for 2004/05 and 2005/06, based on preliminary trade and output data.

Trade Matrices

Import Trade Matrix**Country**

Spain

Commodity

Oranges, Fresh

Time Period

Nov/Oct

Units:

Metric Tons

Imports for:

2003

2004

U,S,

U,S,

Others

Others

Netherlands	21,058	Netherlands	30,000
France	9,517	France	20,000
Other EU	8,635	Other EU	40,000
South Africa	59,915	S, Africa	60,000
Uruguay	23,687	Egypt	40,000
Argentina	19,244	Turkey	30,000
Brazil	8,754	Morocco	20,000
Morocco	5,156	Uruguay	20,000
Zimbabwe	2,689	Argentina	20,000
Chile	2,452		
Total for Others	161,107		280,000
Others not Listed	1,078		19,000
Grand Total	162,185		300,000

Export Trade Matrix**Country**

Spain

Commodity

Oranges, Fresh

Time Period

Nov/Oct

Units:

Metric Tons

Exports for:

2003

2004

U,S,

U,S,

Others

Others

Germany	435,342	Germany	330,000
France	385,268	France	300,000
Netherlands	166,025	Netherlands	120,000
U,K,	112,576	U,K,	90,000
Italy	84,163	Belgium	70,000
Belgium	75,861	Italy	50,000
Poland	70,566	Poland	50,000
Sweden	43,597	Sweden	40,000
Other EU	142,517	Other EU	85,000
Switzerland	30,526	Switzerland	25,000
Total for Others	1,546,441		1,160,000
Others not Listed	50,414		39,990
Grand Total	1,596,855		1,200,000

Policy

- The EU citrus sector benefits from support measures under the EU Common Fruit and Vegetables policy. Producers are eligible to receive EC-established processing subsidies. to the level of EU-set production thresholds. For a summary of measures currently in effect, please check table below.
- The EC has indicated that it will be proposing revision of the Fruit and Vegetables policy during the second semester of CY-2006, which we expect will encourage production by the most competitive farmers, if the EC opts for some degree of subsidy decoupling. As a result, fresh orange production will likely continue to expand, including into areas now cultivated by cotton farmers.
- In order to eradicate the Mediterranean fruit fly, Valencia Regional Autonomous officials will implement a new pest control system during the 2006 crop year. This will enhance Spain's ability to export citrus fruit free of fruit-fly larvae (for more details, please check SP5029).
- Spanish authorities and the local citrus industry carry out regular marketing activities to promote consumption of Spanish citrus fruit domestically, as well as in other EU and non-EU countries. These programs are co-financed by the EU, central and regional governments, and private industry. During 2004/05, these program represented some € 8 Million, of which part were spent promoting Spanish clementines in Atlanta, Saint Louis, Charlotte, Houston and Dallas.

Citrus Production: EU-set Production Thresholds and Processing Subsidies in Effect

	Orange	Lemon	Grapefruit	Small Citrus Fruit
Spanish Production Thresholds (MT)	600,467	192,198	1,919	270,186
EU Production Thresholds	1,500,236	510,600	6,000	384,000
	Producer Processing Subsidies (€/100 kg) (*)			
Annual Contract	9.8	9.10		
Multi-year Contract	11.27	10.47		
Individual Producers	8.82	8.19		

(*) Full subsidies. Due to exceeding the quota in 2003/04, Spanish grapefruit producers were penalized in 2004/05. Subsidies received by local grapefruit producers for single year or multi-year contracts, or by individual producers in 2004/05 were reduced to 7.6, 8.75 and 6.84 €/100 kg delivered product respectively.

Commodity Name: Lemons

Production, Supply & Distribution Table

PSD Table

Country	Spain					
Commodity	Lemons, Fresh					
	(HECTARES)		(1000 TREES)		(1000 MT)	
	2003	Revised	2004	Estimate	2005	Forecast
	USDA	Post	USDA	Post	USDA	Post
	Official	Estimate	Official	Estimate	Official	Estimate
	[Old]	[New]	[Old]	[New]	[Old]	[New]
Market Year Begin	11/2003		11/2004		11/2005	
Area Planted	47,368	47,368	47,400	44,465	0	44,000
Area Harvested	42,000	45,768	42,000	42,000	0	42,000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	1,130	1,130	900	729	0	734
Imports	35	37	40	100	0	100
TOTAL SUPPLY	1,165	1,167	940	829	0	834
Exports	590	552	450	320	0	330
Fresh Dom. Consumption	319	403	275	309	0	304
Processing	256	212	215	200	0	200
TOTAL DISTRIBUTION	1,165	1,167	940	829	0	834

Production

- Fresh lemons production data in the PSD Table is official MAPYA information.
- Producers are opting for the Fino lemon variety, displacing the more traditional Verna variety in an effort to remain competitive with South America producers.
- For Spanish total area and output series, and CY-2003 area breakdown by most significant varieties, please check tables below.

Spain: Lemon Orchard Areas and Outputs series

Year:	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
	Units: hectares						
Total Area	45,213	45,833	47,450	47,141	47,368	44,465	44,000
Total in Prod	41,974	43,961	45,084	44,892	45,768	42,000	42,000
	Units: Metric Tons						
Production	872,644	915,009	1,024,105	993,731	1,129,594	729,400	734,300

Source: MAPYA. Data under 2004/05 and 2005/06 columns are preliminary. We have estimated 2004/05 and 205/06 areas in production.

Consumption

- Fresh lemon use in processing in 2003/04 was provided by MAPYA.
- In the PSD Table, the numbers for fresh consumption are residual, and include weight losses during shipment, other losses and non-harvested citrus.

Spain: Lemon Orchard Areas by Species In CY-2003

Lemon Varieties	Planted Area (hectares)		Scattered Trees (Number)	Uprooted Areas in 2003 (hectares)	New Plantations In 2003 (hectares)
	Total	In Production			
VERNA	21,458	20,826	45,052	1,282	103
MESERO	24,819	23,969	32,634	104	1,723
OTHER LEMON VARIETIES	1,091	973	119,968	29	93
TOTAL	47,368	45,768	197,654	1,415	1,919

Trade

Spain: Fresh Lemon Imports (Metric Tons)

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	25,974	38,977	40,228	61,256	36,560	100,000	100,000
U.S.	24	0	0	0	0	0	0
EU-25	4,292	6,691	2,119	3,720	2,470	8,000	8,000
Non-EU	21,658	32,286	38,109	57,536	34,090	92,000	92,000

Source: Global Trade Atlas (GTIA) up till 2003/04. FAS Office estimate for 2004/05 and 2005/06, based on preliminary trade and output data.

Spain: Fresh Lemon Exports (Metric Tons)

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	485,453	529,908	547,217	517,246	552,005	320,000	330,000
To U.S.	8,962	5,342	4,504	4,346	3,727	1,000	1,000
EU-25	428,196	444,156	451,258	432,123	438,288	290,000	300,000
Other	48,295	80,410	91,455	80,777	109,990	29,000	29,000

Source: Global Trade Atlas (GTIA) up till 2003/04. FAS Office estimate for 2004/05 and 2005/06, based on preliminary trade and output data.

Trade Matrices

Import Trade Matrix

Country

Spain

Commodity

Lemons, Fresh

Time Period

Nov/Oct

Units:

Metric Tons

Imports for:

2003

2004

U.S.

U.S.

Others

Others

France	1,307	France	4,000
Netherlands	634	Other EU	4,000
Italy	362	Argentina	45,000
Other EU	167	S, Africa	6,000
Argentina	31,068	Uruguay	3,000
Uruguay	1,907		
S, Africa	1,115		
Total for Others	36,560		62,000
Others not Listed	0		38,000
Grand Total	36,560		100,000

Export Trade Matrix

Country

Spain

Commodity

Lemons, Fresh

Time Period

Nov/Oct

Units:

Metric Tons

Exports for:

2003

2004

U.S.

U.S.

Others

Others

Germany	104,253	Germany	80,000
France	89,596	France	70,000
Poland	66,183	Poland	40,000
U.K.	39,816	U.K.	35,000
Italy	33,755	Italy	20,000
Netherlands	30,356	Netherlands	20,000
Other EU	80,158	Other EU	25,000
Russia	59,699	Russia	10,000
Ukraine	9,210	Switzerland	7,000
Switzerland	8,032	Croatia	4,000
Total for Others	521,058		311,000
Others not Listed	27,220		8,000
Grand Total	552,005		320,000

Commodity Name: Tangerines

Production, Supply & Distribution Table

PSD Table

Country

Spain

Commodity

Tangerines, Fresh

(HECTARES)(1000
TREES)(1000 MT)

Market Year Begin	2003	Revised	2004	Estimate	2005	Forecast
	USDA	Post	USDA	Post	USDA	Post
	Official	Estimate	Official	Estimate	Official	Estimate
	[Old]	[New]	[Old]	[New]	[Old]	[New]
		11/2003		11/2004		11/2005
Area Planted	118,639	118,639	118,000	109,786	0	109,000
Area Harvested	105,000	99,992	110,000	93,000	0	93,000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	2,060	2,060	2,100	2,458	0	1,945
Imports	10	10	10	15	0	20
TOTAL SUPPLY	2,070	2,070	2,110	2,473	0	1,965
Exports	1,485	1,457	1,550	1,800	0	1,400
Fresh Dom. Consumption	248	379	250	413	0	335
Processing	337	234	310	260	0	230
TOTAL DISTRIBUTION	2,070	2,070	2,110	2,473	0	1,965

Production

- The worst drought in 60 years deterred Spanish 2005/06 tangerine production;
- In the PSD Table above, fresh tangerine production data was provided by MAPYA.
- For fresh tangerine production data series from 1999/00 to 2005/06, and for area breakdown by key cultivated varieties in CY-2003 (latest available data from MAPYA), please check tables below.

Spain: Tangerine Orchard Areas and Outputs series

Year:	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
	Units: hectares						
Total Area	108,316	110,487	114,347	118,742	118,639	109,786	109,000
Total in Prod	91,966	94,746	96,288	98,148	99,992	93,000	93,000
	Units: 1,000 Metric Tons						
Production	2,034	1,802	1,758	2,068	2,060	2,458	1,945

Source: MAPYA. Data under 2004/05 and 2005/06 columns are preliminary. We have estimated 2004/05 and 205/06 areas in production.

Spain: Tangerine Areas in 2003

Tangerine Varieties	Area in Regular Plantation (hectares)		Scattered Trees (Number)	Uprooted Areas in 2003 (Hectares)	New Areas Planted in 2003 (Hectares)
	Total	In Production			
SATSUMAS	10,460	10,273	7,697	1	80
CLEMENTINAS	100,350	83,088	21,151	93	1,053
OTHER MANDARINES	7,829	6,631	23,108	401	647
TOTAL	118,639	99,992	51,956	495	1,780

Consumption

- In the PSD Table, the number for fresh consumption is residual, and includes weight losses during shipment, other losses and non-harvested citrus.
- The 2003/04 tangerine processing was obtained from MAPYA. For breakout by types, please check table below. We have estimated the 2004/05 and 2005/06 consumption data, based on preliminary information.
- For per capita consumption levels, please check table below.

Spain: Tangerine Use in Processing during the 2003/04 Marketing Year

	Units: Metric Tons
Clementines for Juice Production	184,970
Clementines for other Purposes	2,214
Satsumas for Processing	46,968
TOTAL Tangerine Use in Processing	234,152

Spain: Tangerine Per Capita Consumption (Kg/Hab/Year)

CY:	1999	2000	2001	2002	2003	2004	2005
Per Capita Consumption	4.5	5.7	5.3	5.7	6.0	6.5	5.4
Of which,							
. At Home (%)	95.4	95.7	95.2	96.0	94.8	94.8	94.8
. Hotels (%)	2.2	2.2	1.2	1.3	2.2	2.2	2.2
. Institutions (%)	2.4	2.1	3.6	2.7	3.0	3.0	3.0

Source: MAPYA (Consumer Panel) up till CY-2003. FAS Office estimate for CY 2004 and 2005.

Trade**Spain: Fresh Tangerine Imports (Metric Tons)**

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	1,821	10,039	6,512	8,113	10,047	15,000	20,000
U.S.	0	0	0	0	0	0	0
EU-25	823	2,326	3,325	3,695	6,839	10,000	13,000
Non-EU	998	7,713	3,187	4,418	3,208	5,000	7,000

Source: Global Trade Atlas (GTIA) up till 2003/04. FAS Office estimate for 2004/05 and 2005/06, based on preliminary trade and output data.

Spain: Fresh Tangerine Exports (Metric Tons)

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	1,392,544	1,230,054	1,266,872	1,443,500	1,455,867	1,800,000	1,400,000
To U.S.	84,403	94,613	33,303	63,630	65,962	60,000	50,000
EU-25	1,247,228	1,072,437	1,175,981	1,308,108	1,320,176	1,473,000	1,150,000
Other	60,913	63,004	57,588	71,762	69,729	267,000	200,000

Source: Global Trade Atlas (GTIA) up till 2003/04. FAS Office estimate for 2004/05 and 2005/06, based on preliminary trade and output data.

Trade Matrices

Import Trade Matrix

Country

Spain

Commodity

Tangerines, Fresh

Time Period

Nov/Oct

Units:

Metric Tons

Imports for:

2003

2004

U.S,

U.S,

Others

Others

France	3,721	France	5,000
Netherlands	1,642	Portugal	3,000
Portugal	1,032	Netherlands	1,000
Other EU	444	Other EU	1,000
Uruguay	1,259	Uruguay	900
Morocco	878	South Africa	800
Chile	473	Morocco	700
South Africa	293	Peru	400
		Chile	400

Total for Others 9,742

13,200

Others not Listed

305

1,800

Grand Total

10,047

15,000

Export Trade Matrix

Country

Spain

Commodity

Tangerines, Fresh

Time Period

Nov/Oct

Units:

Metric Tons

Exports for:

2003

2004

U.S.

65,962

U.S.

60,000

Others

Others

Germany	368,268	Germany	409,000
France	311,040	France	340,000
U.K.	131,420	U.K.	137,000
Italy	101,854	Poland	135,000
Poland	91,882	Italy	100,000
Netherlands	82,702	Netherlands	90,000
Czech Republic	41,132	Czech Republic	50,000
Other EU	191,878	Other EU	212,000
Switzerland	26,195	Switzerland	40,000
Norway	15,333	Norway	20,000
Total for Others	1,361,704		1,533,000
Others not Listed	28,201		207,000
Grand Total	1,455,867		1,800,000

Policy

Please check similar section under Fresh Oranges.

Commodity Name: Other Citrus

Production, Supply and Distribution Table

PSD Table

Country Commodity	Spain		Citrus, Other, Fresh		(HECTARES)(1000 TREES)(1000 MT)	
	2003 USDA Official [Old]	Revised Post Estimate [New] 11/2003	2004 USDA Official [Old]	Estimate Post Estimate [New] 11/2004	2005 USDA Official [Old]	Forecast Post Estimate [New] 11/2005
Market Year Begin						
Area Planted	1,650	2,033	1,600	2,035	0	2,040
Area Harvested	1,050	650	1,000	700	0	800
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	16	17	15	16	0	15
Imports	0	0	0	0	0	0
TOTAL SUPPLY	16	17	15	16	0	15
Exports	1	1	1	1	0	1
Fresh Dom. Consumption	0	0	0	0	0	0
Processing	15	16	14	15	0	14
TOTAL DISTRIBUTION	16	17	15	16	0	15

- Production data in the PSD refers basically to bitter oranges.
- Spanish bitter oranges are cultivated primarily in Andalucia, being used for processing into marmalade.

Commodity Name: Orange Juice

Production, Supply & Distribution Table

PSD Table

Country	Spain		65 Degrees Brix			
Commodity	Orange Juice				(MT)	
	2003 USDA Official [Old]	Revised Post Estimate [New]	2004 USDA Official [Old]	Estimate Post Estimate [New]	2005 USDA Official [Old]	Forecast Post Estimate [New]
Market Year Begin	11/2003		11/2004		11/2005	
Deliv. To Processors	496,000	491,000	570,000	570,000	0	450,000
Beginning Stocks	500	500	500	1,596	0	1,096
Production	48,500	50,000	56,000	58,000	0	46,000
Imports	76,500	88,337	77,000	80,000	0	85,000
TOTAL SUPPLY	125,500	138,837	133,500	139,596	0	132,096
Exports	97,000	109,241	104,500	110,000	0	102,000
Domestic Consumption	28,000	28,000	28,500	28,500	0	29,000
Ending Stocks	500	1,596	500	1,096	0	1,096
TOTAL DISTRIBUTION	125,500	138,837	133,500	139,596	0	132,096

Production

- Spanish 2005/06 orange juice production will be down from 2004/05 levels, as a consequence of the lower 2005/06 fresh orange harvest.
- Domestic orange juice production should be up over the medium-term as fresh orange production expands (see Fresh Orange section).
- MAPYA provided total quantity of 2003/04 orange deliveries to processors.
- We revised our juice production estimate for 2003/04 and 2004/05, using 9.8 kg of oranges yielding one kg juice, 65 degrees brix.

Trade

General

- Spanish MY 2005/06 orange juice exports will tend to be below average, due to the shorter orange crop (see Fresh Orange section);
- Trade data indicated for MY 2003/04 in the PSD was obtained from the Global Trade Atlas (GTA), and converted to 65 percent Brix;
- Intra-EU trade statistics is subject to under, or over-reporting. We crossed intra-EU trade data for most significant trade partners, and utilized the data we considered more reliable.

- We utilized the following average product concentrations:
- Imports: HTSCN 2009.11 – 67 Percent Brix;
HTSCN 2009.12 – 20 Percent Brix;
HTSCN 2009.19.11 and 2009.19.19 – 85 Percent Brix;
HTSCN 2009.19.91 and 2009.19.98 – 67 Percent Brix.
- Exports: HTSCN 2009.11.11 and 2009.11.19 – 67 Percent Brix;
HTSCN 2009.11.91 and 2009.11.99, 2009.12 – 10 Percent Brix;
HTSCN 2009.19.11 and 2009.19.19 – 67 Percent Brix;
HTSCN 2009.19.91 and 2009.19.98 – 20 Percent Brix.
- Note: Average concentration may differ for the same product category whether it is imported or exported. Industry orange juice imports tend to be made at high concentration levels. Industry juice exports have variable concentration levels, pending upon orders.

Trade Matrices

Import Trade Matrix

Country
Commodity

Spain
Orange Juice

Time Period	Nov/Oct	Units:	Metric Tons
Imports for:	2003		2004
U.S.	0	U.S.	100
Others		Others	
Netherlands	27,513	Belgium	25,000
Germany	15,011	Netherlands	22,000
Belgium	21,475	Germany	15,000
Portugal	8,767	France	7,000
France	5,892	Portugal	2,000
Other EU	1,317	Other EU	1,500
Brazil	6,362	Brazil	5,000
Total for Others	86,337		77,500
Others not Listed	2,000		2,400
Grand Total	88,337		80,000

Export Trade Matrix

Country

Spain

Commodity

Orange Juice

Time Period

Nov/Oct

Units:

Metric Tons

Exports for:

2003

2004

U.S.

U.S.

Others

Others

France	82,466	France	80,000
U.K.	10,320	Germany	10,000
Germany	9,172	U.K.	10,000
Portugal	1,482	Portugal	2,000
Belgium	1,300	Belgium	1,000
Other EU-25	948	Other EU	500
Japan	1,031	Algeria	500
Israel	526		
Algeria	400		
Total for Others	107,645		104,000
Others not Listed	1,539		5,940
Grand Total	109,241		110,000